

Global Data Center Indirect Evaporative Cooling System Supply, Demand and Key Producers, 2026-2032

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Abstracts

The global Data Center Indirect Evaporative Cooling System market size is expected to reach \$ 1788 million by 2032, rising at a market growth of 11.4% CAGR during the forecast period (2026-2032).

Data Center Indirect Evaporative Cooling System is an integrated cooling system designed for data center thermal management. It uses an air-to-air heat exchanger to transfer heat between data center return air and outdoor air cooled through evaporation, allowing the indoor recirculated air to be cooled without direct mixing with the outdoor air stream. The system typically consists of indirect evaporative cooling units, air heat exchange modules, fans, water circulation equipment, water treatment devices, filtration systems, sensors, control platforms, ductwork, and auxiliary mechanical cooling equipment. Based on outdoor temperature and humidity, data hall thermal load, and water availability, the system can automatically switch among dry free cooling, indirect evaporative cooling, and mechanical trim cooling modes. It is primarily used for efficient thermal management in large-scale data centers, cloud computing facilities, colocation data centers, and high-performance computing facilities. The unit price of Data Center Indirect Evaporative Cooling System typically ranges from tens of thousands to hundreds of thousands of US dollars, with a gross profit margin usually between 25% and 35%.

The upstream supply chain of Data Center Indirect Evaporative Cooling Systems mainly includes suppliers of air heat exchangers, evaporative cooling media, metal sheets, fans, motors, pumps, valves, spray components, water treatment equipment, filters, sensors, controllers, variable frequency drives, compressors, refrigerants, chilled water coils, ductwork, structural components, and other materials and parts. Midstream

companies are primarily responsible for system design, thermal calculations, airflow optimization, indirect evaporative cooling unit manufacturing, water system and control system integration, auxiliary cooling configuration, system testing, engineering adaptation, and on-site commissioning. They provide customized thermal management solutions based on data center capacity, building structure, climatic conditions, and reliability requirements. Downstream customers mainly include cloud service providers, internet companies, artificial intelligence computing operators, telecommunications carriers, third-party data center operators, financial institutions, government organizations, and large enterprises operating their own data centers. These systems are generally delivered to end-user projects through data center design institutes, engineering contractors, mechanical and electrical installation companies, and thermal management system integrators.

The Data Center Indirect Evaporative Cooling System market is driven by the expansion of computing infrastructure, increasing rack power density, stricter energy efficiency and carbon reduction requirements, and growing demand for data center operating cost optimization. These systems utilize natural cooling resources and evaporative cooling effects while maintaining physical separation between indoor and outdoor air streams, thereby reducing the operating load of conventional mechanical cooling systems while preserving air cleanliness, temperature and humidity stability, and equipment reliability. Market competition is primarily focused on system energy efficiency, annual operating strategies, climatic adaptability, water efficiency, intelligent control, modular integration, and coordination with liquid cooling and mechanical refrigeration systems. As large-scale data centers, cloud computing infrastructure, and artificial intelligence computing facilities continue to expand, hybrid indirect evaporative cooling systems featuring multi-mode operation, low energy consumption, reduced water use, and high reliability are expected to achieve broader adoption.

This report studies the global Data Center Indirect Evaporative Cooling System production, demand, key manufacturers, and key regions.

This report is a detailed and comprehensive analysis of the world market for Data Center Indirect Evaporative Cooling System and provides market size (US\$ million) and Year-over-Year (YoY) Growth, considering 2025 as the base year. This report explores demand trends and competition, as well as details the characteristics of Data Center Indirect Evaporative Cooling System that contribute to its increasing demand across many markets.

Highlights and key features of the study

Global Data Center Indirect Evaporative Cooling System total production and demand, 2021-2032, (Units)

Global Data Center Indirect Evaporative Cooling System total production value, 2021-2032, (USD Million)

Global Data Center Indirect Evaporative Cooling System production by region & country, production, value, CAGR, 2021-2032, (USD Million) & (Units), (based on production site)

Global Data Center Indirect Evaporative Cooling System consumption by region & country, CAGR, 2021-2032 & (Units)

U.S. VS China: Data Center Indirect Evaporative Cooling System domestic production, consumption, key domestic manufacturers and share

Global Data Center Indirect Evaporative Cooling System production by manufacturer, production, price, value and market share 2021-2026, (USD Million) & (Units)

Global Data Center Indirect Evaporative Cooling System production by Type, production, value, CAGR, 2021-2032, (USD Million) & (Units)

Global Data Center Indirect Evaporative Cooling System production by Application, production, value, CAGR, 2021-2032, (USD Million) & (Units)

This report profiles key players in the global Data Center Indirect Evaporative Cooling System market based on the following parameters - company overview, production, value, price, gross margin, product portfolio, geographical presence, and key developments. Key companies covered as a part of this study include Munters, Vertiv, Nortek, STULZ, FI?ktGroup (Samsung Electronics), Seeley International, Excool, Air2O, Huawei, Envicool, etc.

This report also provides key insights about market drivers, restraints, opportunities, new product launches or approvals.

Stakeholders would have ease in decision-making through various strategy matrices used in analyzing the World Data Center Indirect Evaporative Cooling System market

Detailed Segmentation:

Each section contains quantitative market data including market by value (US\$ Millions), volume (production, consumption) & (Units) and average price (K US\$/Unit) by manufacturer, by Type, and by Application. Data is given for the years 2021-2032 by year with 2025 as the base year, 2026 as the estimate year, and 2027-2032 as the forecast year.

Global Data Center Indirect Evaporative Cooling System Market, By Region:

United States

China

Europe

Japan

South Korea

ASEAN

India

Rest of World

Global Data Center Indirect Evaporative Cooling System Market, Segmentation by Type:

?200 kW

200?400 kW

?400 kW

Global Data Center Indirect Evaporative Cooling System Market, Segmentation by Unit Configuration:

Packaged

Modular

Others

Global Data Center Indirect Evaporative Cooling System Market, Segmentation by Application:

Hyperscale Data Centers

Colocation Data Centers

Enterprise Data Centers

Others

Companies Profiled:

Munters

Vertiv

Nortek

STULZ

FI?ktGroup (Samsung Electronics)

Seeley International

Excool

Air2O

Huawei

Envicool

Haiwu

Shenling

ZTE

Midea Building Tech

TICA

iTeaQ

YMK

Huayi New Energy

Canatal

Aolan

Key Questions Answered:

1. How big is the global Data Center Indirect Evaporative Cooling System market?
2. What is the demand of the global Data Center Indirect Evaporative Cooling System market?
3. What is the year over year growth of the global Data Center Indirect Evaporative Cooling System market?
4. What is the production and production value of the global Data Center Indirect Evaporative Cooling System market?
5. Who are the key producers in the global Data Center Indirect Evaporative Cooling System market?
6. What are the growth factors driving the market demand?

Contents

1 SUPPLY SUMMARY

- 1.1 Data Center Indirect Evaporative Cooling System Introduction
- 1.2 World Data Center Indirect Evaporative Cooling System Supply & Forecast
 - 1.2.1 World Data Center Indirect Evaporative Cooling System Production Value (2021 & 2025 & 2032)
 - 1.2.2 World Data Center Indirect Evaporative Cooling System Production (2021-2032)
 - 1.2.3 World Data Center Indirect Evaporative Cooling System Pricing Trends (2021-2032)
- 1.3 World Data Center Indirect Evaporative Cooling System Production by Region (Based on Production Site)
 - 1.3.1 World Data Center Indirect Evaporative Cooling System Production Value by Region (2021-2032)
 - 1.3.2 World Data Center Indirect Evaporative Cooling System Production by Region (2021-2032)
 - 1.3.3 World Data Center Indirect Evaporative Cooling System Average Price by Region (2021-2032)
 - 1.3.4 North America Data Center Indirect Evaporative Cooling System Production (2021-2032)
 - 1.3.5 Europe Data Center Indirect Evaporative Cooling System Production (2021-2032)
 - 1.3.6 China Data Center Indirect Evaporative Cooling System Production (2021-2032)
 - 1.3.7 Japan Data Center Indirect Evaporative Cooling System Production (2021-2032)
- 1.4 Market Drivers, Restraints and Trends
 - 1.4.1 Data Center Indirect Evaporative Cooling System Market Drivers
 - 1.4.2 Factors Affecting Demand
 - 1.4.3 Data Center Indirect Evaporative Cooling System Major Market Trends

2 DEMAND SUMMARY

- 2.1 World Data Center Indirect Evaporative Cooling System Demand (2021-2032)
- 2.2 World Data Center Indirect Evaporative Cooling System Consumption by Region
 - 2.2.1 World Data Center Indirect Evaporative Cooling System Consumption by Region (2021-2026)
 - 2.2.2 World Data Center Indirect Evaporative Cooling System Consumption Forecast by Region (2027-2032)
- 2.3 United States Data Center Indirect Evaporative Cooling System Consumption

(2021-2032)

2.4 China Data Center Indirect Evaporative Cooling System Consumption (2021-2032)

2.5 Europe Data Center Indirect Evaporative Cooling System Consumption (2021-2032)

2.6 Japan Data Center Indirect Evaporative Cooling System Consumption (2021-2032)

2.7 South Korea Data Center Indirect Evaporative Cooling System Consumption
(2021-2032)

2.8 ASEAN Data Center Indirect Evaporative Cooling System Consumption
(2021-2032)

2.9 India Data Center Indirect Evaporative Cooling System Consumption (2021-2032)

3 WORLD MANUFACTURERS COMPETITIVE ANALYSIS

3.1 World Data Center Indirect Evaporative Cooling System Production Value by
Manufacturer (2021-2026)

3.2 World Data Center Indirect Evaporative Cooling System Production by Manufacturer
(2021-2026)

3.3 World Data Center Indirect Evaporative Cooling System Average Price by
Manufacturer (2021-2026)

3.4 Data Center Indirect Evaporative Cooling System Company Evaluation Quadrant

3.5 Industry Rank and Concentration Rate (CR)

3.5.1 Global Data Center Indirect Evaporative Cooling System Industry Rank of Major
Manufacturers

3.5.2 Global Concentration Ratios (CR4) for Data Center Indirect Evaporative Cooling
System in 2025

3.5.3 Global Concentration Ratios (CR8) for Data Center Indirect Evaporative Cooling
System in 2025

3.6 Data Center Indirect Evaporative Cooling System Market: Overall Company
Footprint Analysis

3.6.1 Data Center Indirect Evaporative Cooling System Market: Region Footprint

3.6.2 Data Center Indirect Evaporative Cooling System Market: Company Product
Type Footprint

3.6.3 Data Center Indirect Evaporative Cooling System Market: Company Product
Application Footprint

3.7 Competitive Environment

3.7.1 Historical Structure of the Industry

3.7.2 Barriers of Market Entry

3.7.3 Factors of Competition

3.8 New Entrant and Capacity Expansion Plans

3.9 Mergers, Acquisition, Agreements, and Collaborations

4 UNITED STATES VS CHINA VS REST OF THE WORLD

4.1 United States VS China: Data Center Indirect Evaporative Cooling System Production Value Comparison

4.1.1 United States VS China: Data Center Indirect Evaporative Cooling System Production Value Comparison (2021 & 2025 & 2032)

4.1.2 United States VS China: Data Center Indirect Evaporative Cooling System Production Value Market Share Comparison (2021 & 2025 & 2032)

4.2 United States VS China: Data Center Indirect Evaporative Cooling System Production Comparison

4.2.1 United States VS China: Data Center Indirect Evaporative Cooling System Production Comparison (2021 & 2025 & 2032)

4.2.2 United States VS China: Data Center Indirect Evaporative Cooling System Production Market Share Comparison (2021 & 2025 & 2032)

4.3 United States VS China: Data Center Indirect Evaporative Cooling System Consumption Comparison

4.3.1 United States VS China: Data Center Indirect Evaporative Cooling System Consumption Comparison (2021 & 2025 & 2032)

4.3.2 United States VS China: Data Center Indirect Evaporative Cooling System Consumption Market Share Comparison (2021 & 2025 & 2032)

4.4 United States Based Data Center Indirect Evaporative Cooling System Manufacturers and Market Share, 2021-2026

4.4.1 United States Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (States, Country)

4.4.2 United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value (2021-2026)

4.4.3 United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production (2021-2026)

4.5 China Based Data Center Indirect Evaporative Cooling System Manufacturers and Market Share

4.5.1 China Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (Province, Country)

4.5.2 China Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value (2021-2026)

4.5.3 China Based Manufacturers Data Center Indirect Evaporative Cooling System Production (2021-2026)

4.6 Rest of World Based Data Center Indirect Evaporative Cooling System Manufacturers and Market Share, 2021-2026

4.6.1 Rest of World Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (State, Country)

4.6.2 Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value (2021-2026)

4.6.3 Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production (2021-2026)

5 MARKET ANALYSIS BY TYPE

5.1 World Data Center Indirect Evaporative Cooling System Market Size Overview by Type: 2021 VS 2025 VS 2032

5.2 Segment Introduction by Type

5.2.1 ?200 kW

5.2.2 200?400 kW

5.2.3 ?400 kW

5.3 Market Segment by Type

5.3.1 World Data Center Indirect Evaporative Cooling System Production by Type (2021-2032)

5.3.2 World Data Center Indirect Evaporative Cooling System Production Value by Type (2021-2032)

5.3.3 World Data Center Indirect Evaporative Cooling System Average Price by Type (2021-2032)

6 MARKET ANALYSIS BY UNIT CONFIGURATION

6.1 World Data Center Indirect Evaporative Cooling System Market Size Overview by Unit Configuration: 2021 VS 2025 VS 2032

6.2 Segment Introduction by Unit Configuration

6.2.1 Packaged

6.2.2 Modular

6.2.3 Others

6.3 Market Segment by Unit Configuration

6.3.1 World Data Center Indirect Evaporative Cooling System Production by Unit Configuration (2021-2032)

6.3.2 World Data Center Indirect Evaporative Cooling System Production Value by Unit Configuration (2021-2032)

6.3.3 World Data Center Indirect Evaporative Cooling System Average Price by Unit Configuration (2021-2032)

7 MARKET ANALYSIS BY APPLICATION

7.1 World Data Center Indirect Evaporative Cooling System Market Size Overview by Application: 2021 VS 2025 VS 2032

7.2 Segment Introduction by Application

7.2.1 Hyperscale Data Centers

7.2.2 Colocation Data Centers

7.2.3 Enterprise Data Centers

7.2.4 Others

7.3 Market Segment by Application

7.3.1 World Data Center Indirect Evaporative Cooling System Production by Application (2021-2032)

7.3.2 World Data Center Indirect Evaporative Cooling System Production Value by Application (2021-2032)

7.3.3 World Data Center Indirect Evaporative Cooling System Average Price by Application (2021-2032)

8 COMPANY PROFILES

8.1 Munters

8.1.1 Munters Details

8.1.2 Munters Major Business

8.1.3 Munters Data Center Indirect Evaporative Cooling System Product and Services

8.1.4 Munters Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.1.5 Munters Recent Developments/Updates

8.1.6 Munters Competitive Strengths & Weaknesses

8.2 Vertiv

8.2.1 Vertiv Details

8.2.2 Vertiv Major Business

8.2.3 Vertiv Data Center Indirect Evaporative Cooling System Product and Services

8.2.4 Vertiv Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.2.5 Vertiv Recent Developments/Updates

8.2.6 Vertiv Competitive Strengths & Weaknesses

8.3 Nortek

8.3.1 Nortek Details

8.3.2 Nortek Major Business

8.3.3 Nortek Data Center Indirect Evaporative Cooling System Product and Services

8.3.4 Nortek Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.3.5 Nortek Recent Developments/Updates

8.3.6 Nortek Competitive Strengths & Weaknesses

8.4 STULZ

8.4.1 STULZ Details

8.4.2 STULZ Major Business

8.4.3 STULZ Data Center Indirect Evaporative Cooling System Product and Services

8.4.4 STULZ Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.4.5 STULZ Recent Developments/Updates

8.4.6 STULZ Competitive Strengths & Weaknesses

8.5 FI?ktGroup (Samsung Electronics)

8.5.1 FI?ktGroup (Samsung Electronics) Details

8.5.2 FI?ktGroup (Samsung Electronics) Major Business

8.5.3 FI?ktGroup (Samsung Electronics) Data Center Indirect Evaporative Cooling System Product and Services

8.5.4 FI?ktGroup (Samsung Electronics) Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.5.5 FI?ktGroup (Samsung Electronics) Recent Developments/Updates

8.5.6 FI?ktGroup (Samsung Electronics) Competitive Strengths & Weaknesses

8.6 Seeley International

8.6.1 Seeley International Details

8.6.2 Seeley International Major Business

8.6.3 Seeley International Data Center Indirect Evaporative Cooling System Product and Services

8.6.4 Seeley International Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.6.5 Seeley International Recent Developments/Updates

8.6.6 Seeley International Competitive Strengths & Weaknesses

8.7 Excool

8.7.1 Excool Details

8.7.2 Excool Major Business

8.7.3 Excool Data Center Indirect Evaporative Cooling System Product and Services

8.7.4 Excool Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.7.5 Excool Recent Developments/Updates

8.7.6 Excool Competitive Strengths & Weaknesses

8.8 Air2O

- 8.8.1 Air2O Details
- 8.8.2 Air2O Major Business
- 8.8.3 Air2O Data Center Indirect Evaporative Cooling System Product and Services
- 8.8.4 Air2O Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
- 8.8.5 Air2O Recent Developments/Updates
- 8.8.6 Air2O Competitive Strengths & Weaknesses
- 8.9 Huawei
 - 8.9.1 Huawei Details
 - 8.9.2 Huawei Major Business
 - 8.9.3 Huawei Data Center Indirect Evaporative Cooling System Product and Services
 - 8.9.4 Huawei Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.9.5 Huawei Recent Developments/Updates
 - 8.9.6 Huawei Competitive Strengths & Weaknesses
- 8.10 Envicool
 - 8.10.1 Envicool Details
 - 8.10.2 Envicool Major Business
 - 8.10.3 Envicool Data Center Indirect Evaporative Cooling System Product and Services
 - 8.10.4 Envicool Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.10.5 Envicool Recent Developments/Updates
 - 8.10.6 Envicool Competitive Strengths & Weaknesses
- 8.11 Haiwu
 - 8.11.1 Haiwu Details
 - 8.11.2 Haiwu Major Business
 - 8.11.3 Haiwu Data Center Indirect Evaporative Cooling System Product and Services
 - 8.11.4 Haiwu Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.11.5 Haiwu Recent Developments/Updates
 - 8.11.6 Haiwu Competitive Strengths & Weaknesses
- 8.12 Shenling
 - 8.12.1 Shenling Details
 - 8.12.2 Shenling Major Business
 - 8.12.3 Shenling Data Center Indirect Evaporative Cooling System Product and Services
 - 8.12.4 Shenling Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

- 8.12.5 Shenling Recent Developments/Updates
- 8.12.6 Shenling Competitive Strengths & Weaknesses
- 8.13 ZTE
 - 8.13.1 ZTE Details
 - 8.13.2 ZTE Major Business
 - 8.13.3 ZTE Data Center Indirect Evaporative Cooling System Product and Services
 - 8.13.4 ZTE Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.13.5 ZTE Recent Developments/Updates
 - 8.13.6 ZTE Competitive Strengths & Weaknesses
- 8.14 Midea Building Tech
 - 8.14.1 Midea Building Tech Details
 - 8.14.2 Midea Building Tech Major Business
 - 8.14.3 Midea Building Tech Data Center Indirect Evaporative Cooling System Product and Services
 - 8.14.4 Midea Building Tech Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.14.5 Midea Building Tech Recent Developments/Updates
 - 8.14.6 Midea Building Tech Competitive Strengths & Weaknesses
- 8.15 TICA
 - 8.15.1 TICA Details
 - 8.15.2 TICA Major Business
 - 8.15.3 TICA Data Center Indirect Evaporative Cooling System Product and Services
 - 8.15.4 TICA Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.15.5 TICA Recent Developments/Updates
 - 8.15.6 TICA Competitive Strengths & Weaknesses
- 8.16 iTeaQ
 - 8.16.1 iTeaQ Details
 - 8.16.2 iTeaQ Major Business
 - 8.16.3 iTeaQ Data Center Indirect Evaporative Cooling System Product and Services
 - 8.16.4 iTeaQ Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)
 - 8.16.5 iTeaQ Recent Developments/Updates
 - 8.16.6 iTeaQ Competitive Strengths & Weaknesses
- 8.17 YMK
 - 8.17.1 YMK Details
 - 8.17.2 YMK Major Business
 - 8.17.3 YMK Data Center Indirect Evaporative Cooling System Product and Services

8.17.4 YMK Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.17.5 YMK Recent Developments/Updates

8.17.6 YMK Competitive Strengths & Weaknesses

8.18 Huayi New Energy

8.18.1 Huayi New Energy Details

8.18.2 Huayi New Energy Major Business

8.18.3 Huayi New Energy Data Center Indirect Evaporative Cooling System Product and Services

8.18.4 Huayi New Energy Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.18.5 Huayi New Energy Recent Developments/Updates

8.18.6 Huayi New Energy Competitive Strengths & Weaknesses

8.19 Canatal

8.19.1 Canatal Details

8.19.2 Canatal Major Business

8.19.3 Canatal Data Center Indirect Evaporative Cooling System Product and Services

8.19.4 Canatal Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.19.5 Canatal Recent Developments/Updates

8.19.6 Canatal Competitive Strengths & Weaknesses

8.20 Aolan

8.20.1 Aolan Details

8.20.2 Aolan Major Business

8.20.3 Aolan Data Center Indirect Evaporative Cooling System Product and Services

8.20.4 Aolan Data Center Indirect Evaporative Cooling System Production, Price, Value, Gross Margin and Market Share (2021-2026)

8.20.5 Aolan Recent Developments/Updates

8.20.6 Aolan Competitive Strengths & Weaknesses

9 INDUSTRY CHAIN ANALYSIS

9.1 Data Center Indirect Evaporative Cooling System Industry Chain

9.2 Data Center Indirect Evaporative Cooling System Upstream Analysis

9.2.1 Data Center Indirect Evaporative Cooling System Core Raw Materials

9.2.2 Main Manufacturers of Data Center Indirect Evaporative Cooling System Core Raw Materials

9.3 Midstream Analysis

9.4 Downstream Analysis

9.5 Data Center Indirect Evaporative Cooling System Production Mode

9.6 Data Center Indirect Evaporative Cooling System Procurement Model

9.7 Data Center Indirect Evaporative Cooling System Industry Sales Model and Sales Channels

9.7.1 Data Center Indirect Evaporative Cooling System Sales Model

9.7.2 Data Center Indirect Evaporative Cooling System Typical Distributors

10 RESEARCH FINDINGS AND CONCLUSION

11 APPENDIX

11.1 Methodology

11.2 Research Process and Data Source

11.3 Disclaimer

List Of Tables

LIST OF TABLES

Table 1. World Data Center Indirect Evaporative Cooling System Production Value by Region (2021, 2025 and 2032) & (USD Million)

Table 2. World Data Center Indirect Evaporative Cooling System Production Value by Region (2021-2026) & (USD Million)

Table 3. World Data Center Indirect Evaporative Cooling System Production Value by Region (2027-2032) & (USD Million)

Table 4. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Region (2021-2026)

Table 5. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Region (2027-2032)

Table 6. World Data Center Indirect Evaporative Cooling System Production by Region (2021-2026) & (Units)

Table 7. World Data Center Indirect Evaporative Cooling System Production by Region (2027-2032) & (Units)

Table 8. World Data Center Indirect Evaporative Cooling System Production Market Share by Region (2021-2026)

Table 9. World Data Center Indirect Evaporative Cooling System Production Market Share by Region (2027-2032)

Table 10. World Data Center Indirect Evaporative Cooling System Average Price by Region (2021-2026) & (K US\$/Unit)

Table 11. World Data Center Indirect Evaporative Cooling System Average Price by Region (2027-2032) & (K US\$/Unit)

Table 12. Data Center Indirect Evaporative Cooling System Major Market Trends

Table 13. World Data Center Indirect Evaporative Cooling System Consumption Growth Rate Forecast by Region (2021 & 2025 & 2032) & (Units)

Table 14. World Data Center Indirect Evaporative Cooling System Consumption by Region (2021-2026) & (Units)

Table 15. World Data Center Indirect Evaporative Cooling System Consumption Forecast by Region (2027-2032) & (Units)

Table 16. World Data Center Indirect Evaporative Cooling System Production Value by Manufacturer (2021-2026) & (USD Million)

Table 17. Production Value Market Share of Key Data Center Indirect Evaporative Cooling System Producers in 2025

Table 18. World Data Center Indirect Evaporative Cooling System Production by Manufacturer (2021-2026) & (Units)

Table 19. Production Market Share of Key Data Center Indirect Evaporative Cooling System Producers in 2025

Table 20. World Data Center Indirect Evaporative Cooling System Average Price by Manufacturer (2021-2026) & (K US\$/Unit)

Table 21. Global Data Center Indirect Evaporative Cooling System Company Evaluation Quadrant

Table 22. World Data Center Indirect Evaporative Cooling System Industry Rank of Major Manufacturers, Based on Production Value in 2025

Table 23. Head Office and Data Center Indirect Evaporative Cooling System Production Site of Key Manufacturer

Table 24. Data Center Indirect Evaporative Cooling System Market: Company Product Type Footprint

Table 25. Data Center Indirect Evaporative Cooling System Market: Company Product Application Footprint

Table 26. Data Center Indirect Evaporative Cooling System Competitive Factors

Table 27. Data Center Indirect Evaporative Cooling System New Entrant and Capacity Expansion Plans

Table 28. Data Center Indirect Evaporative Cooling System Mergers & Acquisitions Activity

Table 29. United States VS China Data Center Indirect Evaporative Cooling System Production Value Comparison, (2021 & 2025 & 2032) & (USD Million)

Table 30. United States VS China Data Center Indirect Evaporative Cooling System Production Comparison, (2021 & 2025 & 2032) & (Units)

Table 31. United States VS China Data Center Indirect Evaporative Cooling System Consumption Comparison, (2021 & 2025 & 2032) & (Units)

Table 32. United States Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (States, Country)

Table 33. United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value, (2021-2026) & (USD Million)

Table 34. United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value Market Share (2021-2026)

Table 35. United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production (2021-2026) & (Units)

Table 36. United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share (2021-2026)

Table 37. China Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (Province, Country)

Table 38. China Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value, (2021-2026) & (USD Million)

Table 39. China Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value Market Share (2021-2026)

Table 40. China Based Manufacturers Data Center Indirect Evaporative Cooling System Production, (2021-2026) & (Units)

Table 41. China Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share (2021-2026)

Table 42. Rest of World Based Data Center Indirect Evaporative Cooling System Manufacturers, Headquarters and Production Site (State, Country)

Table 43. Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value, (2021-2026) & (USD Million)

Table 44. Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production Value Market Share (2021-2026)

Table 45. Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production, (2021-2026) & (Units)

Table 46. Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share (2021-2026)

Table 47. World Data Center Indirect Evaporative Cooling System Production Value by Type, (USD Million), 2021 & 2025 & 2032

Table 48. World Data Center Indirect Evaporative Cooling System Production by Type (2021-2026) & (Units)

Table 49. World Data Center Indirect Evaporative Cooling System Production by Type (2027-2032) & (Units)

Table 50. World Data Center Indirect Evaporative Cooling System Production Value by Type (2021-2026) & (USD Million)

Table 51. World Data Center Indirect Evaporative Cooling System Production Value by Type (2027-2032) & (USD Million)

Table 52. World Data Center Indirect Evaporative Cooling System Average Price by Type (2021-2026) & (K US\$/Unit)

Table 53. World Data Center Indirect Evaporative Cooling System Average Price by Type (2027-2032) & (K US\$/Unit)

Table 54. World Data Center Indirect Evaporative Cooling System Production Value by Unit Configuration, (USD Million), 2021 & 2025 & 2032

Table 55. World Data Center Indirect Evaporative Cooling System Production by Unit Configuration (2021-2026) & (Units)

Table 56. World Data Center Indirect Evaporative Cooling System Production by Unit Configuration (2027-2032) & (Units)

Table 57. World Data Center Indirect Evaporative Cooling System Production Value by Unit Configuration (2021-2026) & (USD Million)

Table 58. World Data Center Indirect Evaporative Cooling System Production Value by

Unit Configuration (2027-2032) & (USD Million)

Table 59. World Data Center Indirect Evaporative Cooling System Average Price by Unit Configuration (2021-2026) & (K US\$/Unit)

Table 60. World Data Center Indirect Evaporative Cooling System Average Price by Unit Configuration (2027-2032) & (K US\$/Unit)

Table 61. World Data Center Indirect Evaporative Cooling System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Table 62. World Data Center Indirect Evaporative Cooling System Production by Application (2021-2026) & (Units)

Table 63. World Data Center Indirect Evaporative Cooling System Production by Application (2027-2032) & (Units)

Table 64. World Data Center Indirect Evaporative Cooling System Production Value by Application (2021-2026) & (USD Million)

Table 65. World Data Center Indirect Evaporative Cooling System Production Value by Application (2027-2032) & (USD Million)

Table 66. World Data Center Indirect Evaporative Cooling System Average Price by Application (2021-2026) & (K US\$/Unit)

Table 67. World Data Center Indirect Evaporative Cooling System Average Price by Application (2027-2032) & (K US\$/Unit)

Table 68. Munters Basic Information, Manufacturing Base and Competitors

Table 69. Munters Major Business

Table 70. Munters Data Center Indirect Evaporative Cooling System Product and Services

Table 71. Munters Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 72. Munters Recent Developments/Updates

Table 73. Munters Competitive Strengths & Weaknesses

Table 74. Vertiv Basic Information, Manufacturing Base and Competitors

Table 75. Vertiv Major Business

Table 76. Vertiv Data Center Indirect Evaporative Cooling System Product and Services

Table 77. Vertiv Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 78. Vertiv Recent Developments/Updates

Table 79. Vertiv Competitive Strengths & Weaknesses

Table 80. Nortek Basic Information, Manufacturing Base and Competitors

Table 81. Nortek Major Business

Table 82. Nortek Data Center Indirect Evaporative Cooling System Product and

Services

Table 83. Nortek Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 84. Nortek Recent Developments/Updates

Table 85. Nortek Competitive Strengths & Weaknesses

Table 86. STULZ Basic Information, Manufacturing Base and Competitors

Table 87. STULZ Major Business

Table 88. STULZ Data Center Indirect Evaporative Cooling System Product and Services

Table 89. STULZ Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 90. STULZ Recent Developments/Updates

Table 91. STULZ Competitive Strengths & Weaknesses

Table 92. FI?ktGroup (Samsung Electronics) Basic Information, Manufacturing Base and Competitors

Table 93. FI?ktGroup (Samsung Electronics) Major Business

Table 94. FI?ktGroup (Samsung Electronics) Data Center Indirect Evaporative Cooling System Product and Services

Table 95. FI?ktGroup (Samsung Electronics) Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 96. FI?ktGroup (Samsung Electronics) Recent Developments/Updates

Table 97. FI?ktGroup (Samsung Electronics) Competitive Strengths & Weaknesses

Table 98. Seeley International Basic Information, Manufacturing Base and Competitors

Table 99. Seeley International Major Business

Table 100. Seeley International Data Center Indirect Evaporative Cooling System Product and Services

Table 101. Seeley International Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 102. Seeley International Recent Developments/Updates

Table 103. Seeley International Competitive Strengths & Weaknesses

Table 104. Excool Basic Information, Manufacturing Base and Competitors

Table 105. Excool Major Business

Table 106. Excool Data Center Indirect Evaporative Cooling System Product and Services

Table 107. Excool Data Center Indirect Evaporative Cooling System Production (Units),

Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 108. Excool Recent Developments/Updates

Table 109. Excool Competitive Strengths & Weaknesses

Table 110. Air2O Basic Information, Manufacturing Base and Competitors

Table 111. Air2O Major Business

Table 112. Air2O Data Center Indirect Evaporative Cooling System Product and Services

Table 113. Air2O Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 114. Air2O Recent Developments/Updates

Table 115. Air2O Competitive Strengths & Weaknesses

Table 116. Huawei Basic Information, Manufacturing Base and Competitors

Table 117. Huawei Major Business

Table 118. Huawei Data Center Indirect Evaporative Cooling System Product and Services

Table 119. Huawei Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 120. Huawei Recent Developments/Updates

Table 121. Huawei Competitive Strengths & Weaknesses

Table 122. Envicool Basic Information, Manufacturing Base and Competitors

Table 123. Envicool Major Business

Table 124. Envicool Data Center Indirect Evaporative Cooling System Product and Services

Table 125. Envicool Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 126. Envicool Recent Developments/Updates

Table 127. Envicool Competitive Strengths & Weaknesses

Table 128. Haiwu Basic Information, Manufacturing Base and Competitors

Table 129. Haiwu Major Business

Table 130. Haiwu Data Center Indirect Evaporative Cooling System Product and Services

Table 131. Haiwu Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 132. Haiwu Recent Developments/Updates

Table 133. Haiwu Competitive Strengths & Weaknesses
Table 134. Shenling Basic Information, Manufacturing Base and Competitors
Table 135. Shenling Major Business
Table 136. Shenling Data Center Indirect Evaporative Cooling System Product and Services
Table 137. Shenling Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 138. Shenling Recent Developments/Updates
Table 139. Shenling Competitive Strengths & Weaknesses
Table 140. ZTE Basic Information, Manufacturing Base and Competitors
Table 141. ZTE Major Business
Table 142. ZTE Data Center Indirect Evaporative Cooling System Product and Services
Table 143. ZTE Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 144. ZTE Recent Developments/Updates
Table 145. ZTE Competitive Strengths & Weaknesses
Table 146. Midea Building Tech Basic Information, Manufacturing Base and Competitors
Table 147. Midea Building Tech Major Business
Table 148. Midea Building Tech Data Center Indirect Evaporative Cooling System Product and Services
Table 149. Midea Building Tech Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 150. Midea Building Tech Recent Developments/Updates
Table 151. Midea Building Tech Competitive Strengths & Weaknesses
Table 152. TICA Basic Information, Manufacturing Base and Competitors
Table 153. TICA Major Business
Table 154. TICA Data Center Indirect Evaporative Cooling System Product and Services
Table 155. TICA Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)
Table 156. TICA Recent Developments/Updates
Table 157. TICA Competitive Strengths & Weaknesses
Table 158. iTeaQ Basic Information, Manufacturing Base and Competitors
Table 159. iTeaQ Major Business

Table 160. iTeaQ Data Center Indirect Evaporative Cooling System Product and Services

Table 161. iTeaQ Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 162. iTeaQ Recent Developments/Updates

Table 163. iTeaQ Competitive Strengths & Weaknesses

Table 164. YMK Basic Information, Manufacturing Base and Competitors

Table 165. YMK Major Business

Table 166. YMK Data Center Indirect Evaporative Cooling System Product and Services

Table 167. YMK Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 168. YMK Recent Developments/Updates

Table 169. YMK Competitive Strengths & Weaknesses

Table 170. Huayi New Energy Basic Information, Manufacturing Base and Competitors

Table 171. Huayi New Energy Major Business

Table 172. Huayi New Energy Data Center Indirect Evaporative Cooling System Product and Services

Table 173. Huayi New Energy Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 174. Huayi New Energy Recent Developments/Updates

Table 175. Huayi New Energy Competitive Strengths & Weaknesses

Table 176. Canatal Basic Information, Manufacturing Base and Competitors

Table 177. Canatal Major Business

Table 178. Canatal Data Center Indirect Evaporative Cooling System Product and Services

Table 179. Canatal Data Center Indirect Evaporative Cooling System Production (Units), Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share (2021-2026)

Table 180. Canatal Recent Developments/Updates

Table 181. Canatal Competitive Strengths & Weaknesses

Table 182. Aolan Basic Information, Manufacturing Base and Competitors

Table 183. Aolan Major Business

Table 184. Aolan Data Center Indirect Evaporative Cooling System Product and Services

Table 185. Aolan Data Center Indirect Evaporative Cooling System Production (Units),

Price (K US\$/Unit), Production Value (USD Million), Gross Margin and Market Share
(2021-2026)

Table 186. Aolan Recent Developments/Updates

Table 187. Aolan Competitive Strengths & Weaknesses

Table 188. Global Key Players of Data Center Indirect Evaporative Cooling System
Upstream (Raw Materials)

Table 189. Global Data Center Indirect Evaporative Cooling System Typical Customers

Table 190. Data Center Indirect Evaporative Cooling System Typical Distributors

List Of Figures

LIST OF FIGURES

Figure 1. Data Center Indirect Evaporative Cooling System Picture

Figure 2. World Data Center Indirect Evaporative Cooling System Production Value: 2021 & 2025 & 2032, (USD Million)

Figure 3. World Data Center Indirect Evaporative Cooling System Production Value and Forecast (2021-2032) & (USD Million)

Figure 4. World Data Center Indirect Evaporative Cooling System Production (2021-2032) & (Units)

Figure 5. World Data Center Indirect Evaporative Cooling System Average Price (2021-2032) & (K US\$/Unit)

Figure 6. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Region (2021-2032)

Figure 7. World Data Center Indirect Evaporative Cooling System Production Market Share by Region (2021-2032)

Figure 8. North America Data Center Indirect Evaporative Cooling System Production (2021-2032) & (Units)

Figure 9. Europe Data Center Indirect Evaporative Cooling System Production (2021-2032) & (Units)

Figure 10. China Data Center Indirect Evaporative Cooling System Production (2021-2032) & (Units)

Figure 11. Japan Data Center Indirect Evaporative Cooling System Production (2021-2032) & (Units)

Figure 12. Data Center Indirect Evaporative Cooling System Market Drivers

Figure 13. Factors Affecting Demand

Figure 14. World Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 15. World Data Center Indirect Evaporative Cooling System Consumption Market Share by Region (2021-2032)

Figure 16. United States Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 17. China Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 18. Europe Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 19. Japan Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 20. South Korea Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 21. ASEAN Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 22. India Data Center Indirect Evaporative Cooling System Consumption (2021-2032) & (Units)

Figure 23. Producer Shipments of Data Center Indirect Evaporative Cooling System by Manufacturer Revenue (\$MM) and Market Share (%): 2025

Figure 24. Global Four-firm Concentration Ratios (CR4) for Data Center Indirect Evaporative Cooling System Markets in 2025

Figure 25. Global Four-firm Concentration Ratios (CR8) for Data Center Indirect Evaporative Cooling System Markets in 2025

Figure 26. United States VS China: Data Center Indirect Evaporative Cooling System Production Value Market Share Comparison (2021 & 2025 & 2032)

Figure 27. United States VS China: Data Center Indirect Evaporative Cooling System Production Market Share Comparison (2021 & 2025 & 2032)

Figure 28. United States VS China: Data Center Indirect Evaporative Cooling System Consumption Market Share Comparison (2021 & 2025 & 2032)

Figure 29. United States Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share 2025

Figure 30. China Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share 2025

Figure 31. Rest of World Based Manufacturers Data Center Indirect Evaporative Cooling System Production Market Share 2025

Figure 32. World Data Center Indirect Evaporative Cooling System Production Value by Type, (USD Million), 2021 & 2025 & 2032

Figure 33. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Type in 2025

Figure 34. ?200 kW

Figure 35. 200?400 kW

Figure 36. ?400 kW

Figure 37. World Data Center Indirect Evaporative Cooling System Production Market Share by Type (2021-2032)

Figure 38. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Type (2021-2032)

Figure 39. World Data Center Indirect Evaporative Cooling System Average Price by Type (2021-2032) & (K US\$/Unit)

Figure 40. World Data Center Indirect Evaporative Cooling System Production Value by Unit Configuration, (USD Million), 2021 & 2025 & 2032

Figure 41. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Unit Configuration in 2025

Figure 42. Packaged

Figure 43. Modular

Figure 44. Others

Figure 45. World Data Center Indirect Evaporative Cooling System Production Market Share by Unit Configuration (2021-2032)

Figure 46. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Unit Configuration (2021-2032)

Figure 47. World Data Center Indirect Evaporative Cooling System Average Price by Unit Configuration (2021-2032) & (K US\$/Unit)

Figure 48. World Data Center Indirect Evaporative Cooling System Production Value by Application, (USD Million), 2021 & 2025 & 2032

Figure 49. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Application in 2025

Figure 50. Hyperscale Data Centers

Figure 51. Colocation Data Centers

Figure 52. Enterprise Data Centers

Figure 53. Others

Figure 54. World Data Center Indirect Evaporative Cooling System Production Market Share by Application (2021-2032)

Figure 55. World Data Center Indirect Evaporative Cooling System Production Value Market Share by Application (2021-2032)

Figure 56. World Data Center Indirect Evaporative Cooling System Average Price by Application (2021-2032) & (K US\$/Unit)

Figure 57. Data Center Indirect Evaporative Cooling System Industry Chain

Figure 58. Data Center Indirect Evaporative Cooling System Procurement Model

Figure 59. Data Center Indirect Evaporative Cooling System Sales Model

Figure 60. Data Center Indirect Evaporative Cooling System Sales Channels, Direct Sales, and Distribution

Figure 61. Methodology

Figure 62. Research Process and Data Source

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